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Report of the Blue Ribbon Panel on Libraries at Risk to the Montana State Library Commission

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Cover photograph of the Helena Public Library, 1893, looking north.
Photo courtesy of the Montana Historical Society, Helena.

Report of the Blue Ribbon Panel on Libraries at Risk to the Montana State Library Commission

Blue Ribbon Panel Membership

The following Montana citizens were
appointed to serve as members of the Panel:

Chair Jim Nybo (Helena)

Vice-Chair Margaret Kingsland (Missoula)

Noreen Alldredge (Bozeman)

Judy Browning (Helena)

John Delano (Helena)

Richard Dunn (Missoula)

Peggy Guthrie (Choteau)

Suzy Holt (Helena)

Royal Johnson (Billings)

Henry McClernan (Butte)

Sidney Poole (Helena)

EXECUTIVE SUMMARY

REPORT OF MONTANA'S BLUE RIBBON PANEL ON LIBRARIES AT RISK

The Panel was appointed by the State Library Commission, and instructed to examine the full range of problems and opportunities facing all of Montana's libraries and to make recommendations for action. The major building blocks of the Panel's report are: a description of the current status of Montana's libraries; an assessment of Montana's library and information service needs; and a series of recommendations for action.

Equal and timely access to information is a prerequisite for a functioning democracy. In the 1990's, access to up-to-date information is also essential for economic survival in a rapidly changing world. Montana is a large and sparsely populated state with a very high level of literacy, education, and academic achievement, and a persistently low level of personal income and economic activity.

In Montana, an array of libraries has developed over the years, including public, school, academic, and special libraries. Many of Montana's libraries participate to varying degrees in several formal and informal networks, including public library federations, the Western Library Network, and the Montana Library Association.

In assessing the information needs of all Montanans, and in making recommendations for action, the Panel partitioned the report into the subheadings of **cooperation**, **technology**, and **funding**.

Cooperation between libraries presents a substantial opportunity for improved services and cost savings. Examples include improved sharing of library materials through computerized data bases of library holdings, multi-purpose libraries (such as school/public libraries), and overall coordination of library and information services. The Panel's recommendations for improved cooperation call for a systematic assessment of all of Montana's libraries by the State Library Commission; a review and assessment of the library federations; the active fostering of alliances between local public and school libraries; coordination with University System library and information services; institution of a program to provide graduate librarian training to Montanans; and enhanced public access to Montana's special library collections.

The emerging computerized information **technology** is particularly well-suited to meeting the information needs of citizens of a large and sparsely populated state like Montana. The information technology can improve the use of existing library materials, and can provide immediate access to computerized data bases. The recommendations for improved use of information technology call for a substantial

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expansion in the use of this technology by the state's libraries, through the wide deployment of computerized information-sharing systems and a program of continuing education for librarians and information specialists.

Even after instituting enhancements in cooperation, there is a substantial need for additional **funding** if Montanans are to have satisfactory access to modern library and information services. The report calls for adequate funding of Montana's program of state aid to libraries (HB 193 in the 1989 Legislature); adequate funding for the collections in Montana's University System libraries; and legislation to allow local governments to exceed I-105 ceilings for library funding. The report recommends a public-private partnership to fund a major initial investment in technology networking hardware for all of Montana's libraries. Other funding recommendations include the formation of local public library foundations and endowments; encouraging local school districts to spend more on school library services; and educating local public library boards on the benefits and needs of offering competitive financial packages to library professionals.

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INTRODUCTION

We the people of Montana grateful to God for the quiet beauty of our state, the grandeur of our mountains, the vastness of our rolling plains, and desiring to improve the quality of life, equality of opportunity and to secure the blessings of liberty for this and future generations do ordain and establish this constitution.

Preamble to the Montana Constitution, 1972

I think by far the most important bill in our whole code is that for the diffusion of knowledge among the people. No other sure foundation can be devised, for the preservation of freedom and happiness.

Thomas Jefferson, 1789

The Blue Ribbon Panel on Libraries at Risk was appointed because of a perception that library services, which are such an integral part of an informed citizenry and of the quality of life in Montana, are threatened. It is our intent, as a Panel, to examine the current state of library services in Montana, and through this process, provide a basis for the continued improvement of library services in the future.

In the "Information Age" in which we live, the acquisition and utilization of information is ever more vital to the continued well-being of our citizens. Montana cannot afford to fall behind in the efforts to provide her citizens with the tools to compete in this new age, and to provide a means to sort through the "information explosion" which continues unabated in our society. Libraries, as the traditional way we can equitably provide information to citizens, need to be examined to determine how they can provide improved services to all Montanans.

It is with these thoughts in mind that the Blue Ribbon Panel approached this effort. If we can provide the basis for a reasoned discussion of the future of libraries in Montana, and can present viable alternatives to be examined, we will have accomplished our charge. We look forward to responses to this study and stand ready to discuss its recommendations.

Charge To the Blue Ribbon Panel

In creating the Blue Ribbon Panel, the Montana State Library Commission stated that:

- Continued progress toward developing the prosperity of Montana and maintaining its renowned lifestyle are strongly dependent upon the quality of library services.
- The quality of library services is an integral part of Montana's education efforts.
- Montana's persistent economic conditions, and certain state statutory provisions have created the continuing inability of libraries to provide adequate library services to the citizens of Montana.
- Current library services as they exist may be at risk.

The Commission gave the Blue Ribbon Panel the following duties and responsibilities:

- Examine the current state of library services in Montana.
- Assess the future needs of all aspects of library services within the context of improving quality, access and accountability.
- Identify potential economies, including the overall structure of Montana's libraries, and including potential, innovative partnerships.
- Identify and make recommendations on the financial needs of Montana's libraries.
- Identify priority areas of development needed to improve the quality of library services, and a means of financing those priorities.

The Blue Ribbon Panel met four times between September and December of 1990, and Chairman Jim Nybo presented the Panel's report to the Montana State Library Commission on December 12, 1990. In spite of time constraints and limited resources, the Panel managed to identify serious shortcomings in Montana's library and information services and to recommend corrective action.

CHAPTER 1

CURRENT STATE OF LIBRARY SERVICES IN MONTANA

"Nationally Montana ranks 6th in high school graduation rate, 4th in college entrance exam scores, 15th in years of schooling, and has the sixth highest literacy rate in the country."

Montana's libraries are of several different types, depending on the primary groups they serve. But no matter what type of library, all are part of the state's fabric of information provision, and all have resources and strengths to contribute for the good of all. Libraries have been described as "people's universities," because of their unique status in the ongoing self-education of the people. Throughout the history of the United States, the free flow of information has characterized what is best about our representative democracy. This concept is no less important today than it was to our country's founders.

Public Libraries

Montana's per capita expenditure for public libraries is \$7.33 compared with the national average of \$12.63.

Public libraries provide general library services without charge to all residents of a given community. These libraries have the broadest mission because they occupy a unique place in our society, serving all members of the community, regardless of age or economic status.

Montana's Public Libraries at a Glance

Number	111
Number in towns with less than 1,000 population	53
Number with professionally-trained librarians	12
Number with fax machine	33
Libraries open at least 40 hours per week	less than half

The importance of the library in small-town and rural Montana cannot be overestimated. In many cases it is there as the result of generations of dedicated citizens working for its existence with few resources. The rural library faces considerable challenges in today's world in order to remain relevant to its users.

Public Library Federations

Montana's public libraries each belong to one of six library federations which are headquartered in public libraries in Glasgow, Miles City, Billings, Helena, Missoula, and Great Falls. The federations are membership organizations supported by Coal Severance Tax and state general fund monies and dedicated to the improvement of public library services by providing means for cooperative services, continuing education, and sharing of resources. Typical federation services include the providing of microfiche listings of library holdings in the Western Library Network (WLN) regional data base, the establishment of fax networks, backup reference services, interlibrary loan, and workshops for members.

School Libraries

In 1990 Montana's 769 schools have a total of 311 Full Time Equivalent certified school librarians.

A library media center and its programs function as the hub of the school. This centralized source of information includes print and non-print materials needed to support and enhance the curriculum, along with the necessary equipment. The library media center also functions to nurture a life-long love of literature and learning.

Montana School Accreditation Standards require certified professionals to assist students and staff in their quests for facts and fiction. But many schools are operating at the minimum level of standards rather than striving for excellence in their library media programs. The hours the centers are open are dependent upon the availability of staff. The staffing levels appear to remain fairly constant but are not sufficient to keep libraries open and staffed the full school day. Expenditures for library materials show no clear pattern over the years to indicate that school media centers are keeping up with inflation.

Academic Libraries

It has been 15 years since the University of Montana has added to its overall number of journals. Montana State University has canceled 25% of its journal titles during the last five years.

The academic library is an integral part of a college, university or other postsecondary institution. It is organized and administered to meet the information needs of students, faculty, and affiliated staff of the institution.

Montana's public and private academic libraries number 24 and range from the largest collections at Montana State University and the University of Montana to more limited collections available at some vocational-technical centers. In general the following conditions prevail:

- Per student expenditure has remained static or increased slightly
- Number of professionally-trained librarians has diminished
- Number of materials added to collections has decreased significantly due to cost increases; this is especially true for journals in various scientific and technical areas including agriculture and mining
- Inflation in the costs of materials has continued unabated, and the purchasing power of academic libraries has diminished significantly

Special Libraries

A former hospital administrator indicated that access to current medical information was one of the most frequently stated concerns of physicians considering moving into a rural area.

A special library is established, supported, and administered by a business firm, private corporation, association, government agency, non-profit organization or other special-interest group to meet the information needs of its members.

The role of some special libraries in meeting the information needs of all Montanans may be less than for other types of libraries. But these libraries contain valuable collections and information which could be of benefit to all Montanans.

Of fifty-seven special libraries identified, twenty-two are publicly funded as a component of government -- e.g., the Montana State Library, the Montana State Law

Library, the Montana Historical Society Library, the Legislative Council Library, and so forth. The remaining are private, non-profit, or corporate entities. Their subject specialties vary widely, including energy, genealogy, commerce, art, and so forth, but the most common specialty focus is health, with 22 libraries listed. Of Montana's 64 hospitals, 17 have a library, and 9 have professionally-trained librarians.

Most non-profit or publicly-funded special libraries will share their information resources and expertise with other lists. A recent survey of special libraries serving private corporations indicates that while most do not loan materials, a majority engage in other cooperative activities with other libraries.

Montana State Library

The Montana State Library, which is governed by the State Library Commission, provides library and information services to state government, extends library consulting and development services statewide, serves 2500 blind and physically handicapped patrons throughout the state, maintains data bases related to the state's natural resources, provides library services to unserved areas of the state, and administers federal and state library-related funds.

In addition, the State Library serves as a focal point for the sharing of library resources by providing backup reference, referral, and interlibrary loan service throughout the state.

CHAPTER 2

AN ASSESSMENT OF LIBRARY NEEDS

In the 1990's, Montanans in search of information have substantial unmet needs. Montana is a state with a very high level of literacy and educational attainment. But Montana is vast, sparsely populated, and financially poor. The decade of the 90's promises to be a period of challenge, change, and opportunity. To meet the challenge and capture these opportunities, Montanans need information. Fortunately, the technology of the information age, with computer networks and shared data, is well-suited for a large state like Montana. But putting the new information technology to work will require a higher level of cooperation, a commitment to use our limited financial resources in the most efficient manner possible, and the dedication of additional financial resources.

The Panel finds that libraries have historically been prominent in the information mainstream, and they should continue to play a vital role in the 90's. In seeking to understand the comprehensive information needs of all Montanans, the Panel has explored a wide range of barriers, challenges, and opportunities. While being mindful of the institutional framework of libraries, including public, school, academic, and special libraries, the Panel has looked beyond these boundaries at fundamental aspects of information problems and opportunities under three broad headings: **cooperation**, **technology**, and **funding**.

The primary focus has been on the information services delivered to the people of Montana. Only after exploring the broad information needs of Montanans has the Panel shifted its focus to examine the institutions that can deliver those services.

Cooperation

Cooperation relates to ways that libraries of all types can work together more effectively and efficiently in meeting the information needs of Montanans. Cooperation includes networking, resource sharing, interlibrary loan, multitype library cooperation, and overall coordination of library and information services.

Montana's dispersed and independent library framework reflects the special missions, governance, and funding sources of our libraries. But given the information explosion, steeply rising costs of books and periodicals, and the state's financial condition, a compelling case can be made for improving efficiency through cooperation and coordination.

In 1975, Roundup, Musselshell County, and School District 55-H joined forces and built one library in Roundup High School. This library successfully serves both the public and the students. Seeley Lake, Marion, Opheim, and Winnett have since followed Roundup's example.

Alliances between local school and public libraries may prove beneficial to the users of both types of library services, especially in rural areas. Efficiencies of such relationships need to be weighed to ensure that the primary clientele of each library service benefits from such a partnership.

Increasingly, there is a need for technical and specialized information by persons living in areas remote from academic or specialized information centers. Topics that address individual continuing education, retraining, business activity, technical and professional needs could be delivered through improved existing library networks. Special libraries, by their basic nature, have usually been established within an organization to meet its own specialized needs.

Cooperation is already a priority for Montana's libraries. No library can function effectively without a basic core collection to serve the day-to-day needs of its users, yet no library can afford to own every book or magazine. The collective materials in Montana's libraries may be inadequate by many standards, but an improved means of sharing these resources would allow all of the state's libraries to offer better library and information services.

Cooperation, through the sharing of already existing resources, makes economic sense.

Technology

In 1988 a woman attending a demonstration of medical information technology in Sidney asked if the computer could give her an alternative to having her foot amputated. Her physician used the resulting information about a new procedure, and her foot was saved.

Libraries can meet the challenge of supplying new information which significantly supports economic viability, continuing education and health in their communities. They must be able to effectively link their communities with the information resources in the rest of Montana, the nation and the world. New information technology makes this feasible in even the most remote corner of Montana, as long as it has electricity, telephone service, and the necessary equipment and expertise.

Current information technology includes computerized data bases, laser discs, videotape, compact discs, telefacsimile (fax) machines and more. It also encompasses the technology that modern libraries and information professionals use to manage information, such as computerized card catalogs, and regional and national computer networks such as the Western Library Network (WLN) and MEDLINE.

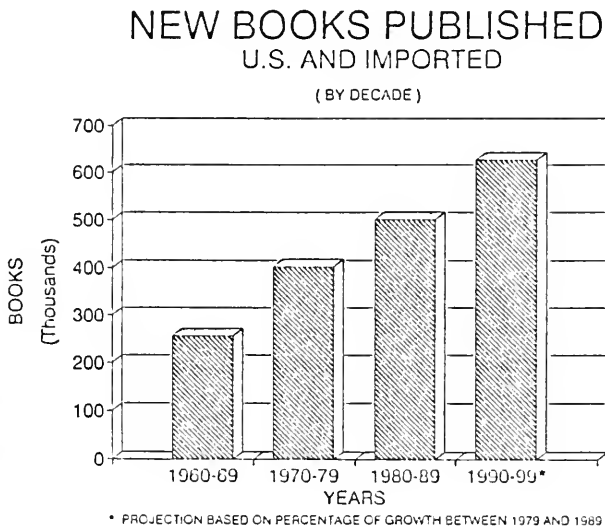
While not information rich, Montana could make better use of the resources we have by providing a more effective means for identifying and sharing the collections of books, magazines, and audiovisual materials already in our collections. For example, most of Montana's public libraries and virtually all of our school libraries lack the technology to quickly identify materials available in other library collections and to arrange to borrow them. Such technology, while not free, is rapidly becoming less expensive. The lack of computer equipment and software is one aspect of this need, and the know-how to put it to use is another.

Today a great deal of information comes in some form other than the printed word, such as a computer data base with a connection over a telephone line. Much of the computer equipment that can be used for resource sharing can also be used to tap into on-line data bases. There is an important unmet need in this area, particularly for Montanans who make their living doing research or professional work.

Funding

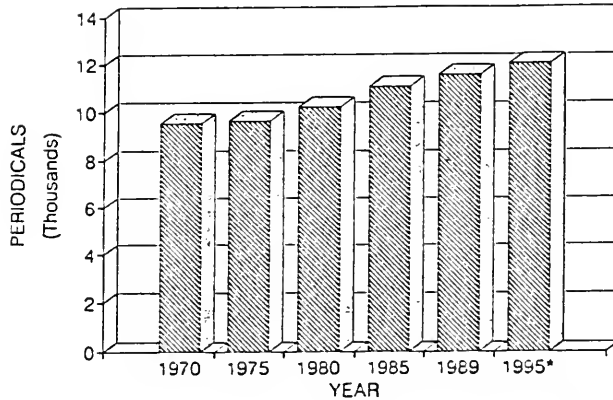
There is no free lunch -- Montanans have to pay for library and information services, including the rising costs of library materials. The solutions to many of the problems and needs identified through this review process have funding implications. Means of addressing funding include direct tax support, grants, user fees, and cutting costs through efficiency improvements. A problem common to all libraries is keeping the materials collections current. The 80's brought about an information explosion. Whole new fields of interest came into being, such as microcomputers and AIDS.

The increase in the number of new books and magazines continues unabated, as illustrated by the graphs shown.



PERIODICALS PUBLISHED U.S. AND IMPORTED

(BY DECADE)



* PROJECTION BASED ON PERCENTAGE OF GROWTH BETWEEN 1985 AND 1989

At the same time, significantly increased costs make it more difficult to keep up with the information explosion. For example, while the Consumer Price Index rose an average of 3.3 percent per year from 1985 to 1988, book prices rose an average of 7.2 percent per year, and magazines and journals increased 9.2 percent per year. In another example, a book which costs \$21.98 in 1980 cost \$41.21 in 1989.

Nowhere is the impact of inadequate funding greater than in the libraries of Montana's University System, where the collections are simply not staying current enough to properly serve the information needs of students and faculty. If Montanans are to be competitive in the fast-paced world of the 90's and beyond, then their information sources must be brought up to par and maintained. Without stable funding, even the academic libraries' core collections (that is, those basic materials necessary to answer the majority of the information needs) cannot be sustained. This does not even take into account the development of new fields of knowledge, the research efforts at the major academic institutions, and the traditional role that academic libraries play as the heaviest individual providers of materials to public libraries in the state.

User access to materials also depends on the availability of trained personnel who know how to respond to an information request. As information needs become more specialized and as resource sharing becomes more sophisticated, a higher level of training and education for library personnel is needed. This can be done through training of existing personnel as well as by hiring those with the requisite knowledge and experience.

In fiscal year 1987, financial difficulties caused by the property tax freeze enacted by Initiative 105 forced the Lewis and Clark Public Library to eliminate its children's librarian, terminate outreach services to rural schools and shut-ins, freeze all staff salaries, and cut library hours by 24%. Since that time some services have been restored through county voters twice approving an emergency levy. The initial response of the Parmly Billings Public Library was to place a moratorium on the purchase of all books for one year.

One final example of the significant funding problem facing Montana's public libraries is Initiative 105 (I-105), passed by the voters in 1986. I-105 placed a freeze on local property tax levels, and the legislature has chosen not to provide much in the way of alternatives for local governments. This funding constraint has placed local public libraries in a horrendous squeeze, caught between increasing demands for services, rising costs of materials, and declining revenues to provide them.

Summary of Findings

After carefully examining the facts, the Panel finds that the ability of Montanans to obtain library and information services in the 1990's is indeed at risk. Funding is inadequate to maintain current library service levels, much less to keep up with the information explosion. This translates into real reductions in library materials available, declining staff levels, a reduced ability to hire and retain qualified staff, inability to access the computerized information sources used today, limitations in the ability to tap into the collections of other libraries, and reduced services for the public.

While there is a clear need for additional funding, there is a parallel need for libraries of all types to work together more cooperatively--to share materials and to coordinate services--in a fashion calculated to enhance services through efficiency improvements.

The Panel finds that the emerging information technology is particularly appropriate for Montana. A commitment to putting this technology in the hands of trained information specialists can bring a substantial improvement in meeting our growing needs for library and information services.



CHAPTER 3

RECOMMENDATIONS FOR ACTION

It is important to note that this report was written to reflect the most pressing needs. Addressing the complete list of needs would have made the report much too long and detailed. Furthermore, the Panel recognizes that many of those who will have a hand in implementing these recommendations rightfully must have a great say in determining how each is to be accomplished. The Panel did not take a firm stand on precisely how each recommendation should be funded to avoid politicizing the report and giving detractors an excuse to walk away from a very important problem (and opportunity!).

The Panel's recommendations fall under the three headings of cooperation, technology, and funding.

- Major efforts must be undertaken to foster enhanced **cooperation** and coordination among all of Montana's libraries. Doing so will provide efficiencies that will allow both service improvements and cost savings.
- A commitment to deploying the information **technology** of the 1990's in Montana's libraries will improve resource sharing and other forms of cooperation, and will help to ensure that all Montanans--students, teachers, business people, researchers, and the general public--can have timely and affordable access to the currency of the future: information.
- Even with the efficiencies called for above, there is a clear need for additional **funding**--now and into the future--on a stable, continuing basis.

Cooperation

In planning the use of its new addition, the Meagher County / City Library in White Sulphur Springs will soon house the automation equipment for the local low-power television station; the library's meeting room will double as a studio for live broadcasts.

Recommendation: the State Library Commission should undertake a systematic assessment of the strengths and weaknesses of all of Montana's libraries, including collections, and periodically update it. Every four years, in the year following a gubernatorial election, the State Library Commission should issue a report on the state of Montana's libraries, and make recommendations for needed improvements.

Recommendation: the State Library Commission should undertake a review and assessment of the role of library federations, including an examination of their effectiveness today and their suitability to include all types of libraries.

Recommendation: the State Library Commission and the Superintendent of Public Instruction should foster alliances between local public libraries and schools, through the provision of information, training, and technical support to local library boards and librarians, and to local school boards and administrators. This assistance should address the mechanics of cooperation, including interlocal agreements and organizational and management issues. The State Library Commission should continue to use federal Library Services and Construction Act (LSCA) funding for pioneering efforts which demonstrate the benefits and the mechanics of cooperation

Recommendation: the State Library Commission should initiate, at both the staff and board levels, an ongoing dialogue with the Montana University System on coordination of library and information services.

Recommendation: the State Library Commission should identify and address Montanans' needs for access to specialized information resources not usually available in local public libraries. More of Montana's special collections should be included in the Western Library Network. Citizens and public librarians should be educated about availability and utilization of these resources.

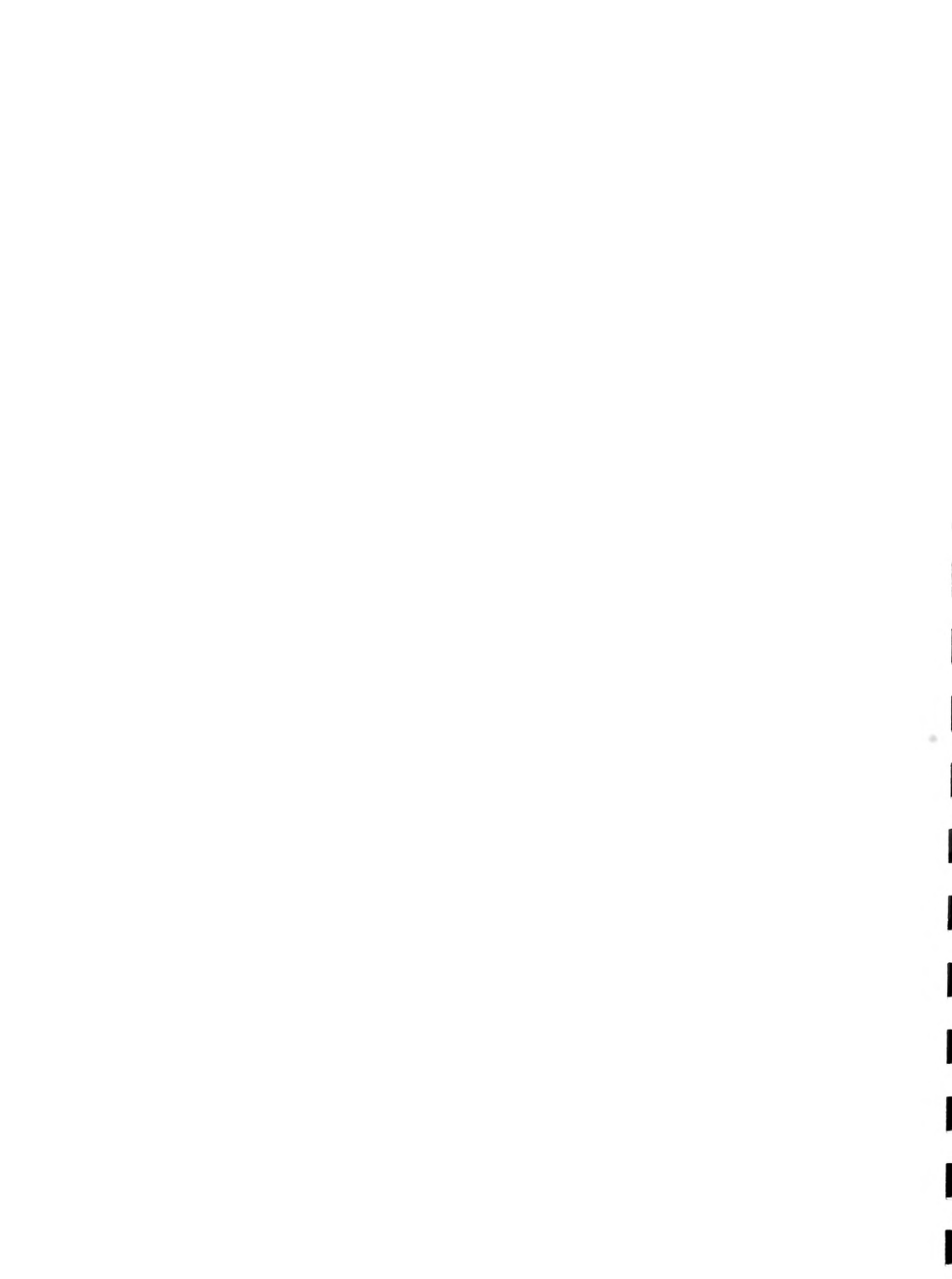
Recommendation: the State Library Commission, in cooperation with the Superintendent of Public Instruction and the Montana Library Association, should provide the leadership in establishing a program of continuing education for librarians.

Recommendation: the Montana State Library should regularly collect uniform statistics on Montana libraries, including data on library usage, size of collections, funding, and, as part of its library statistics activity, should be a source of current information on salaries and benefits paid to library professionals and other library employees in Montana and elsewhere in the country.

Recommendation: the State Library Commission should encourage the Board of Regents to develop a Western Interstate Commission for Higher Education (WICHE) program to make graduate librarian training (Master of Library Science) available to Montanans.

Technology

Recommendation: the State Library Commission should provide leadership, expertise, and coordination in using information-sharing technology.



Recommendation: the State Library Commission should encourage the provision by local public libraries of information in computerized form by instituting a program of demonstration grants by which local public libraries can get started with their own on-line data base search capabilities.

Recommendation: Montana's public libraries should obtain the technology and know-how to rapidly identify and borrow materials available in other library collections. This should be accomplished through the technology hardware and continuing education programs addressed below.

Funding

Recommendation: the State of Montana should contribute to a base level of funding to keep Montana's public library collections current by appropriating adequate funding for the program of state aid to public libraries instituted (but not fully funded) by HB 193 in the 1989 Legislature.

Recommendation: the State of Montana should provide adequate funding for the collections in Montana's University System libraries, by significantly increasing and designating funding for this purpose, including a yearly increase to accommodate inflation.

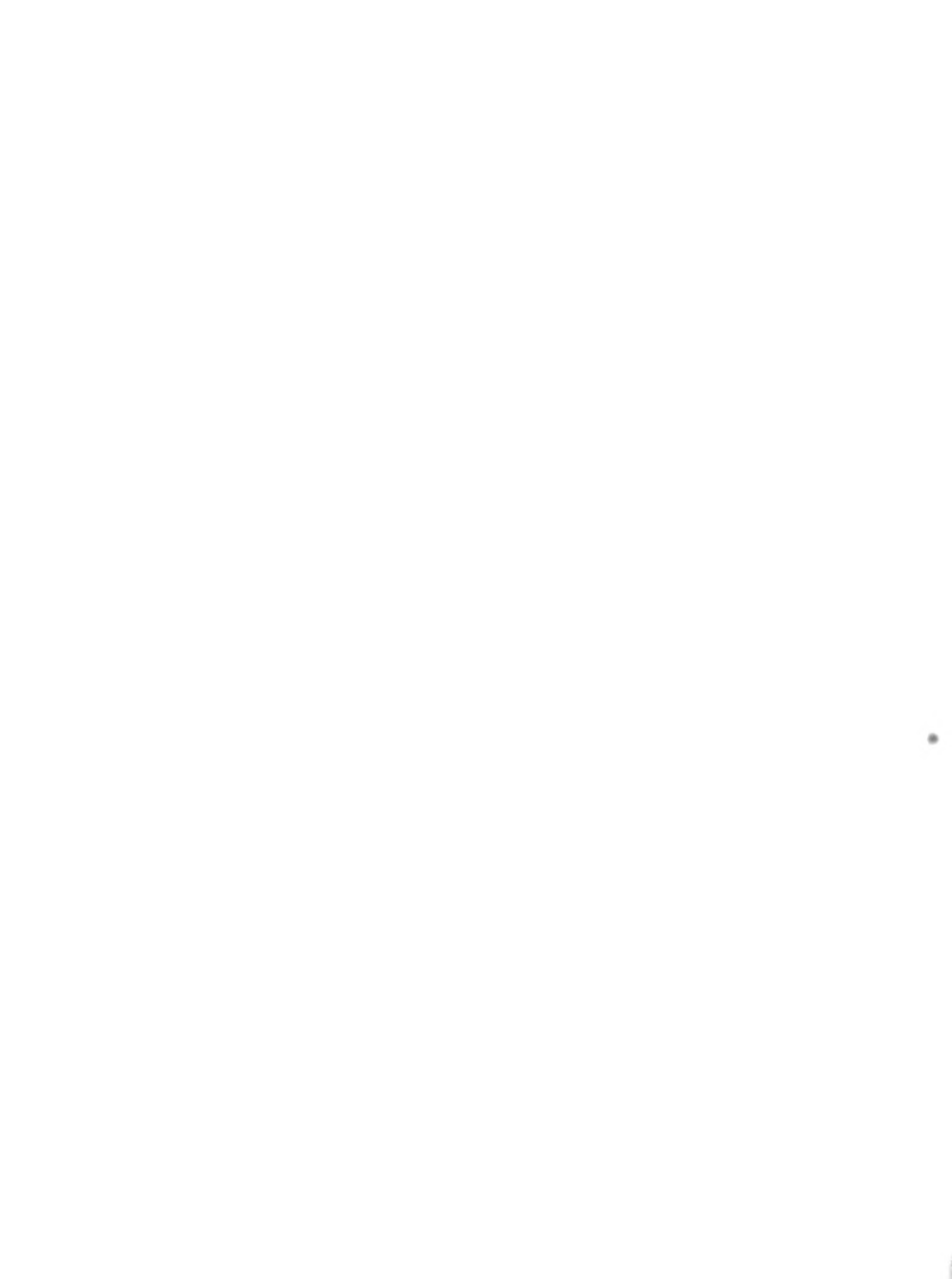
Recommendation: the State Library Commission and the Superintendent of Public Instruction should actively encourage local public school boards and administrators to apportion more money for library services.

Recommendation: the State Library Commission and the Montana Library Association should actively support and assist in the formation of library foundations and endowments for each public library in Montana.

Recommendation: the State Library Commission should actively seek to educate local library boards and funding entities regarding the advantages of hiring trained library professionals and the necessity of offering a competitive pay and benefits package.

Recommendation: the State of Montana should provide flexibility for Montana's local governments to fund library services at the level desired in the local community, by exempting library funding from the Initiative 105 ceilings, or, alternatively, establishing a mechanism whereby local voters can adopt such an exemption.

Recommendation: the State Library Commission should initiate a collaborative effort, along with the Montana Library Association, and Montana's business community, to develop and implement a strategy to fund a large initial investment in technology networking hardware for all of Montana's libraries. This important venture is particularly well-suited for a public-private partnership.



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